

We are currently updating our site; thank you for your patience.

# INVENTORY

# PART REQUESTS - REQUISITION - SINGLE ITEM

A purchase requisition for a <u>single item</u> can be created directly from the **Part Requests** listing screen.

This process can be used when there is <u>no</u> stock available in the company warehouse(s) and you wish to buy stock specifically for the part request.

You can also view, at a glance, how much <u>current stock</u> of a selected item is available in the request **source** warehouse. This will enable you to make a decision as to whether a requisition needs to be raised to fulfill the request of the item.

#### Ribbon Select Inventory > Part Requests



- The Part Requests for the Site screen will display.
- The **Site** filter will be set according to your company configuration. If required, select the Site you wish to work in.

Note: Refer to <u>Site Selections</u> for more information.

• The State filter will default to '**All States**' upon opening. You do not need to select a specific State to proceed with the **delete** pro-



cess. However, if you wish to narrow your search parameters,

select the **State** that contains the part request you wish to delete.

Note: Refer to State/Type Selections for more information.

• The list of **part requests** displayed will be dependent on the **Site** and **State** selected.

						Part Requests for the Site - Nucleus Service: V								
0	Home	Equipme	ent / Locati	ions Contract	Finance / HR Ir	wentory Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting Utilities		- 0	
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	DocNo	SourceType	State	Reference	BinName	PartDesc	PartCode	WarehouseName	Quantity	PartTypeDesc	CurrentStock	CalReference	ModelNo	
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	KPQ00000002	WHSE	GR	KZ - Main	KZ - OS - Equipment	Sprint Multi Functional Copier	SP2020	KZ - Office Supplies	2.00	A Class Part	2.00		SP2020	
	KPQ0000003	WHSE	PR	KZ - Over the Counter	KZ - OS - Accessories	Fuser Unit	SP2020-7223	KZ - Office Supplies	2.00	B Class Part	0.00			
	KPQ0000004	WHSE	PR	KZ - Main	KZ - OS - Consumables	Toner Black	SP2020-2671	KZ - Office Supplies	2.00	C Class Part	0.00			
	KPQ0000005	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier Multi Function	M2540	KZ - Office Supplies	1.00	A Class Part	8.00		M2540	
	KPQ0000006	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier Multi Function	M2540	KZ - Office Supplies	1.00	A Class Part	8.00		M2540	
	KPQ0000009	WHSE	N	KZ - Main	KZ - OS - Accessories	Fuser Unit	SP2020-7223	KZ - Office Supplies	1.00	B Class Part	0.00	0.00 4.00 4.00		
	KPQ00000010	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Printer	ECOSYS M2	KZ - Main 3.1	3.00	A Class Part	4.00		ECOSYS M2635dw	
	KPQ00000011	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Printer	ECOSYS M2	KZ - Main	1.00	A Class Part	4.00		ECOSYS M2635dw	
	KPQ00000012	WHSE	N	KZ - Over the Counter	KZ - EL - Equipment	Sharp MX-4051 A3 color multifunctional printer	MX4051	KZ - Electronics	1.00	A Class Part	0.00		MX4051	
	KPQ00000013	WHSE	N	KZ - Arts and Craft	KZ - EL - Equipment	Sharp MX-4051 A3 color multifunctional printer	MX4051	KZ - Electronics	1.00	A Class Part	0.00		MX4051	
	KPQ00000017	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP500-2671		2.00	C Class Part	300.00			
	KPQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Paper Tray	SP2020-1992	KZ - Main	2.00	B Class Part	20.00			
	KPQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Toner Black	SP2020-2671	KZ - Main	4.00	C Class Part	305.00			
	KPQ00000019	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Staple Unit	SP2020-3671	KZ - Main	1.00	B Class Part	50.00			
	KPQ0000007	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP2020-2671	KZ - Main	1.00	C Class Part	305.00			
	KPQ0000021	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Sprint Multi Functional Copier	SP 500	KZ - Main	1.00	A Class Part	50.00		SP 500	
	KPQ0000021	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP500-2671	KZ - Main	1.00	C Class Part	300.00			
	KPQ0000022	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	SP500 Colour Copier	SP500-001	KZ - Main		A Class Part	0.00		SP500-001	
	KPQ00000022	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Yellow	M2540-003	KZ - Main	1.00	C Class Part	0.00		M2540-003	

# **SELECT ITEM**

- Either scroll down the list or,
- Use the <u>Auto Filter Row</u>, **or** the <u>sort icon</u> to find the specific part request item.

Note: There may be <u>more than one</u> item linked to a part request but in this process, only a <u>single item</u> on a part request is being requisitioned.

- In this example, there are **2** items linked to this part request.
- Select the **row** of the particular part request item where you wish to raise a requisition.
- In this example, you can see that the Current Stock available in the requested warehouse for this item is 0, therefore raising a requisition for this request item is prudent.



# **RAISE REQUISITION**

• Click on **Requisition**.

Home	Equipment Equipment Back S		ions Contract	Finance / HR In Requisition		ts Manufacturing	<b>F B</b>	Sales	Service	Reporting Utilities		- 0
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KPQ0000002	WHSE	GR	KZ - Main	KZ - OS - Equipment	Sprint Multi Functional Copier	SP2020	KZ - Office Supplies	2.00	A Class Part	2.00		SP2020
KPQ0000003	WHSE	PR	KZ - Over the Counter	KZ - OS - Accessories	Fuser Unit	SP2020-7223	KZ - Office Supplies	2.00	B Class Part	0.00		
KPQ00000004	000004 WHSE PR KZ - Main KZ - OS - Consumables		KZ - OS - Consumables	Toner Black	SP2020-2671	KZ - Office Supplies	2.00	C Class Part	0.00			
KPQ0000005	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier Multi Function	M2540	KZ - Office Supplies	1.00	A Class Part	8.00		M2540
KPQ00000006	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier Multi Function	M2540	KZ - Office Supplies	1.00	A Class Part	8.00		M2540
KPQ0000009	WHSE	N	KZ - Main	KZ - OS - Accessories	Fuser Unit	SP2020-7223	KZ - Office Supplies	1.00	B Class Part	0.00		
KPQ00000010	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Printer	ECOSYS M2	KZ - Main	3.00	A Class Part	4.00		ECOSYS M2635dw
KPQ00000011	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Printer	ECOSYS M2	KZ - Main	1.00	A Class Part	4.00		ECOSYS M2635dw
KPQ00000012	WHSE	N	KZ - Over the Counter	KZ - EL - Equipment	Sharp MX-4051 A3 color multifunctional prin	nter MX4051	KZ - Electronics	1.00	A Class Part	0.00		MX4051
KPQ00000013	WHSE	N	KZ - Arts and Craft	KZ - EL - Equipment	Sharp MX-4051 A3 color multifunctional prin	nter MX4051	KZ - Electronics	1.00	A Class Part	0.00		MX4051
KPQ00000017	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP500-2671	KZ - Main	2.00	C Class Part	300.00		
KPQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Paper Tray	SP2020-1992	KZ - Main	2.00	B Class Part	20.00		
KPQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Toner Black	SP2020-2671	KZ - Main	4.00	C Class Part	305.00		
KPQ00000019	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Staple Unit	SP2020-3671	KZ - Main	1.00	B Class Part	50.00		
KPQ0000007	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP2020-2671	KZ - Main	1.00	C Class Part	305.00		
KPQ0000021	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Sprint Multi Functional Copier	SP 500	KZ - Main	1.00	A Class Part	50.00		SP 500
KPQ0000021	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP500-2671	KZ - Main	1.00	C Class Part	300.00		
KPQ00000022	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	SP500 Colour Copier	SP500-001	KZ - Main	1.00	A Class Part	0.00		SP500-001
KP000000022	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Yellow	M2540-003	K7 - Main	1.00	C Class Part	0.00		M2540-003

- A **Procurement Purchase Requisition** message box will pop up with the following prompt:
  - $^\circ~$  Are you sure you want to create a new purchase
    - requisition to procure this part?
- Click on Yes.

Home	Equipmen	t / Locat	ions Contract	Finance / HR Ir	nventory Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting Utilities		- 0
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KPQ00000002	WHSE	GR	KZ - Main	KZ - OS - Equipment	Sprint N Are you sure you want to cre	ate a new purchas	e requisition	2.00	A Class Part	2.0		SP2020
KP00000003	WHSE	PR	KZ - Over the Counter	KZ - OS - Accessories	Fuser U to procure this part?			2.00	B Class Part	0.0	0	
KP00000004	WHSE	PR	KZ - Main	KZ - OS - Consumables	Toner B			2.00	C Class Part	0.0	0	
KPC00000005	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier I			1.00	A Class Part	8.0	0	M2540
KP000000006	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier I	Yes	No	1.00	A Class Part	8.0		M2540
KPQ0000009	WHSE	N	KZ - Main	KZ - OS - Accessories	Fuser Unit	SP2020-7223	KZ - Office Supplies	1.00	B Class Part	0.0	0	
KPQ00000010	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Printer	ECOSYS M2	KZ - Main	3.00	A Class Part	4.0	0	ECOSYS M2635dw
KPQ00000011	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Printer	ECOSYS M2	KZ - Main	1.00	A Class Part	4.0	0	ECOSYS M2635dw
KPQ00000012	WHSE	N	KZ - Over the Counter	KZ - EL - Equipment	Sharp MX-4051 A3 color multifunctional printer	MX4051	KZ - Electronics	1.00	A Class Part	0.0	0	MX4051
KPQ00000013	WHSE	N	KZ - Arts and Craft	KZ - EL - Equipment	Sharp MX-4051 A3 color multifunctional printer	MX4051	KZ - Electronics	1.00	A Class Part	0.0	0	MX4051
KPQ00000017	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP500-2671	KZ - Main	2.00	C Class Part	300.0	0	
KPQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Paper Tray	SP2020-1992	KZ - Main	2.00	B Class Part	20.0	0	
KPQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Toner Black	SP2020-2671	KZ - Main	4.00	C Class Part	305.0	0	
KPQ00000019	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Staple Unit	SP2020-3671	KZ - Main	1.00	B Class Part	50.0	0	
KPQ0000007	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP2020-2671	KZ - Main	1.00	C Class Part	305.0	0	
KPQ00000021	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Sprint Multi Functional Copier	SP500	KZ - Main	1.00	A Class Part	50.0	0	SP 500
KPQ00000021	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black	SP500-2671	KZ - Main	1.00	C Class Part	300.0	0	
KPQ0000022	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	SP500 Colour Copier	SP500-001	KZ - Main	1.00	A Class Part	0.0		SP500-001
KPQ00000022	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Yellow	M2540-003	KZ - Main	1.00	C Class Part	0.0		M2540-003

## **VIEW NEW PURCHASE REQUISITION**

• A **Procurement - Service Request** message box will pop up with the following prompt:



#### A new purchase requisition, number [] has been created. Do you want to view it?

• Click on Yes.

Note: If you select No, then you will remain in the Part Requests for the Site screen.

B Home	k G lete Back S	nt / Locat	Workspaces Save Filter	Finance / HR Ir Requisition	fer Note Change	Remap Part	KwaZulu-Natal • - All States - • Ref	resh Print Expor	Ì	Sales	Service	Reporting Uti	lities	- 0
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KPQ0000003	WHSE	PR	KZ - Over the Counter	KZ - OS - Accessories	Fuser Unit		SP2020-72	23 KZ - Office Supple	es	2.00	B Class Part	0.	0.00	
KPQ00000004	WHSE	PR	KZ - Main	KZ - OS - Consumables	Toner Black	Procurement - S	envice Request			2.0	C Class Part		0.00	
KPQ0000005	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier Multi Function	indearenteine 5	errice nequest				A Class Part		8.00	M2540
KPQ00000006	WHSE	N	KZ - Main	KZ - OS - Electronics	Copier Multi Function	_				1.00	A Class Part		8.00	M2540
KPQ0000009	WHSE	N	KZ - Main	KZ - OS - Accessories	Fuser Unit		purchase requisition, nu d. Do you want to view it		s been	1.00	0 B Class Part		0.00	
KPQ00000010	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Print		d. Do you want to view it			3.00	1.00 A Class Part		4.00	ECOSYS M2635dw
KPQ00000011	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Kyocera Digital Print					1.00	A Class Part		4.00	ECOSYS M2635dw
KPQ00000012	WHSE	N	KZ - Over the Counter	KZ - EL - Equipment	Sharp MX-4051 A3 c			Yes	No	1.0	A Class Part		0.00	MX4051
KPQ00000013	WHSE	N	KZ - Arts and Craft	KZ - EL - Equipment	Sharp MX-4051 A3 c						A Class Part		0.00	MX4051
KPQ00000017	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black		SP500-267	1 KZ - Main		2.0	C Class Part		300.00	
KPQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Paper Tray		SP2020-19	92 KZ - Main		2.0	B Class Part		20.00	
KPQ00000018	WHSE	N	KZ - Home and Garden	KZ - Receiving Bin	Toner Black		SP2020-26	71 KZ - Main			C Class Part		305.00	
KPQ00000019	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Staple Unit		SP2020+36	71 KZ - Main		1.00	B Class Part		50.00	
KPQ0000007	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black			71 KZ - Main			C Class Part		305.00	
KPQ0000021	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Sprint Multi Functiona	al Copier	SP 500	KZ - Main			A Class Part		50.00	SP500
KPQ0000021	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Black			1 KZ - Main			C Class Part		300.00	
KPQ0000022	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	SP500 Colour Copier		SP500-001				A Class Part		0.00	SP500-001
KPQ00000022	WHSE	N	KZ - Over the Counter	KZ - Receiving Bin	Toner Yellow		M2540-003	KZ - Main		1.0	C Class Part		0.00	M2540-003

- The Purchase Requisition Listing screen will open.
- The newly created purchase requisition will be selected.
- Click on View.

									Purchase	Requisition Listin	<b>ig -</b> Nucleus Service: Version 20							
E	٥	Home	Equipr	nent / Lo	ocations	Contrac	t Finan	ce / HR	Inventory	Maintena	ince / Projects Man	ufacturing Procuremen	it Sales S	Service Rep	orting Utilitie	es		0
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Ŧ	+ +	KPR0000010 KPR0000013 KPR0000018	MAINT MAINT MAINT MAINT	N N N N	∎r B B Rowan		8,625.00 2,012.50 23,236.90 19,569.55	03 Apr 2024 04 Apr 2024 05 Apr 2024	∎ <b>[</b> c 11:51:36 09:53:41 09:17:07 15:42:40	xilit Yes Yes Yes Yes		A[]:						
Ŧ	÷	KPR0000010 KPR0000013 KPR0000018 KPR0000026	MAINT MAINT MAINT MAINT MAINT	N N N N N	∎ B Rowan Rowan	7,500.00 1,750.00 20,206.00 17,017.00	8,625.00 2,012.50 23,236.90 19,569.55 4,025.00	03 Apr 2024 04 Apr 2024 05 Apr 2024 11 Apr 2024	■ <u></u> c 11:51:36 09:53:41 09:17:07 15:42:40	xilit Yes Yes Yes Yes		A[]:						

• The Edit Requisition screen will open.

Note: Although this screen is called 'Edit Requisition' screen, you will note that there is no Save button, only a Back button as this is a <u>view only</u> screen.

• Only the specific part request item that was selected in the process above is listed in the data grid.



 If a primary item supplier<sup>1</sup> has been set up on the part definition, then the Unit Cost, Supplier Code and Supplier Name fields will populate with the linked supplier details.

For a detailed handling of this topic refer to Parts - Items Supplied

- If you wish to link a **Note** to this requisition, you can click on the tab and add a note from here.
- Click on **Back** or **Close** the screen to return to the **Purchase Requisition Listing** screen.

						Edit Requisition										
3 3 sck	Home E Save Layout	Equipment / Location	is Contrai	ct Finar	nce / HR	Inventory	Maintenance / F	Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities		0
	Ту	pe Maintenance Requisiti	on ~	•									Origin Type Wa	arehouse	-	
	Cla	iss Inventory		•									Origin KZ	- Main	•	
	Request Da	ite 22 Apr 2024 -	12:28:02										Related			
	Billing Addres	ss Unit No.6, Main Buildir 21 Main Road Hoy Park	19 A	•												
		ne 084 555 1234											Requestor Brig	gitte B	•	
		ail contact@exampledom	ain.co.za													
	Contact Nan	me PC Employee KZ														
		to group by that column														,
Parti	Type PartCoo		scription			WarehouseNam			TaxRate		ExchangeRate	SerialNo	SupplierCode	SupplierName		
Parti •@c	PartCoo *IIt PART SP500-0	*D*			Priority =	WarehouseNam *Dr 3 KZ - Main	=	UnitCost = 1.00 0.	-	-	-	SerialNo Alle 0.00 0	SupplierCode	SupplierName		
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arti Oc	ALL APART SP500-4	400 001 599				a∏c	=	-	-	-	-	n∐c	404	-Q-		0.00

### **EDIT REQUISITION OPTIONS**

• From the **Purchase Requisition Listing** screen, you can **Edit** the Purchase Requisition if required:

<sup>1</sup>This will be the supplier that you regularly buy a particular part/item from. The primary supplier is linked to the part definition. Any purchase requisitions raised for this part definition will be created with the primary suppliers details linked. The purchase requisition can be edited to link an alternative supplier, if required.



- Add, Edit Requisition Items (Parts & Qty)
- Add, Edit Supplier and Unit Cost

#### **RELEASE AND APPROVE REQUISITION OPTIONS**

- From this screen, you can also continue the process to:
- <u>Release</u> and
- <u>Approve</u> the requisition, as required.

									quisition Listing										
0	3	Home	Equipment	/ Location	s Contr	act Finar	nce / HR I	inventory	Maintenar	ice / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities		- I d	9
Ad		Edit Delete	View 0	Release	$\oslash$	Clone Requisition	Save Layout W		rint Export	KwaZulu-Natal	Refresh								
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	PRC	de 💌	PRType	Status	LastName	ExdCost	IndCost	EventDate	EventTime	SupplierExist	Comments		Notes			CustomerCode	CustomerName	SourceRef	
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	Ð	KPR0000038	MAINT	N	В	9,928.00	11,417.20	25 Apr 2024	15:51:21	Yes									
	÷	KPR0000037	MAINT	N	В	29,784.00	34,251.60	25 Apr 2024	15:50:55	Yes									
	Ð	KPR0000035	MAINT	N	В	29,784.00	34,251.60	25 Apr 2024	15:42:08	Yes									
			MAINT	N	В	0.00	0.00	22 Apr 2024	12:34:50	No									
		KPR0000034																	
+		KPR0000034	MAINT	N	В	0.00	0.00	22 Apr 2024	12:28:02	No									
•			MAINT	N N	B Rowan	0.00		22 Apr 2024 12 Apr 2024	12:28:02 10:12:50	No Yes									
•	÷	KPR0000033					19,558.05												
•	+	KPR0000033 KPR0000028	MAINT	N	Rowan	17,007.00	19,558.05 4,025.00	12 Apr 2024	10:12:50	Yes			Primary Suppli	er.					

- Close the screen -
- Or use the Nucleus Open Windows Functionality to return to the Part Requests for the Site screen where this process began.

#### **Related Topics**

Part Requests - Requisition - Multiple Items

MNU.032.008